



# **NAVY ESPC TEAM M&V UPDATE**

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# Presentation Topics



- **Navy Program Update**
- **Adopted M&V Guidance/Templates**
- **Navy Project Documentation Matrix**
- **Program/Project Integrity Issues**

# Navy Program Update



- **Continue to wait for new ESPC Legislation**
- **Navy ESPC Program remains on hold**
  - 17 potential ESPC projects awaiting new legislation
- **Currently only considering in scope modifications where additional work improves existing ECM's**
- **Navy ESPC Team Improvements**
  - Improving documentation collection and storage process
  - Updating and developing new SOP's for PF and CO use
  - Improving M&V review process
  - Adopting completed M&V guidance/templates

# Adopted M&V Guidance/Templates



- **Navy DORFP modification**
  - Section C.4.2, has been modified to include:  
“Specify that contractor shall provide an M&V Plan, Post-Installation M&V Report and Annual Report in adherence with the format of the DOE outline documents specified in Section J, List of Attachments”.
  - Also, included in Section C.4.2:  
“Specify that annual report shall be provided in electronic PDF format on CD”.
- **Navy Project Documentation Matrix**
  - Adopted customized Project Documentation Structure

# Navy Project Documentation Matrix



- **Based on the Project Documentation Structure developed by the Project Documentation Working Group**
  - **Modified for Navy ESPC Team use**
  - **Navy Project Documentation Matrix will be used by PF's to:**
    - **Track key project documentation**
    - **Track who holds, when received, and in what format project documentation are in**
- \* Intent is to ensure that all key project documentation can be accounted for and that the Matrix can be shared between PF's, CO's, the activity, future PF's, etc.*

# Navy Project Documentation Matrix



Project Documentation Matrix						Last Update			
Core documents through project life									
<b>General Project Information</b>									
Contract Source #									
Delivery Order #									
Base/Location									
Site Tech Representative		Phone #							
Region									
Region POC		Phone #							
Claim/CNI/MCHQ									
Claim/CNI/MCHQ POC		Phone #							
Contracting Vehicle									
ESCO									
ESCO PD		Phone #							
Navy ESPC PF		Phone #							
Navy ESPC CO		Phone #							
<b>Project Description</b>									
Yellow highlight indicates items required to be held by CO		Comments	Documents Held By				Media	Received	
			CO	PF	Site	Other	(H, CD, E, NAFI)	Date	
<b>1. Pre-Award documents</b>									
a. Site Data – Government generated									
	i. Site Data Package								
	ii. Audit Studies/Surveys								
	iii. MOA								
	iv. Other								
b. IP/Phase I documents									
	i. Initial Proposal (IP)/Phase I approval notification								
	ii. IP								
	iii. IP Response to comments, mtg minutes, etc.								
	iv. Incentive Funding Spreadsheet Life Cycle Cost Analysis								
	v. Other								
c. Notice of intent (NOI) to award									
d. Congressional notification letter, if applicable (project > \$10 million)									
e. DO RFP/SOW									
	i. Terms and Conditions								
	ii. Attachments								
	iii. Other								

# Program/Project Integrity Issues



- **M&V AVR's -**

- **“Estimated savings versus Actual savings.” Believe AVR's should focus on “Guaranteed savings versus Actual savings”**
  - The comparison of estimated versus actual raised flag with GAO auditors
  - Viewed difference of estimated and guaranteed savings as amount that should be returned to the US Treasury

- **Transition to standard format M&V documents**

- **Transition will help Navy ESPC Team develop an efficient M&V review process, reduce review time and ultimately free up time to continue to develop new DO's.**
- **Hope ESCO's will work with Navy ESPC Team to transition Post Installation Reports and AVR's for awarded projects.**

# Navy ESPC Team Points of Contact



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